



# INTRODUCING ORCID

## WHAT, WHY AND HOW

TOM DEMERANVILLE | HELSINKI BOOTCAMP | MARCH 2017



Connecting Research  
and Researchers

TOM DEMERANVILLE  
*Senior Project Officer – Project THOR*  
<http://orcid.org/0000-0003-0902-4386>

ORCID.org

# WHAT IS THE PROBLEM?

Connecting researchers with  
their professional activities  
can be very difficult

# NAMES ARE MESSY

Matthew J Buys, MJ Buys, M  
Buys, Matthew John Buys,

بایز ، ماثیو

# AND THEY'RE NOT UNIQUE

Google matt buys portrait

All Images News Shopping Videos More ▾ Search tools View saved SafeSearch ▾ Settings



# FURTHERMORE...

- Names change over time
- Transliteration is difficult
  - J. Å. S. Sørensen
  - J. Aa. S. Sørensen
  - J. Åge S. Sørensen
  - J. Aage S. Sørensen
  - J. Åge Smærup Sørensen
  - J. Aage Smaerup Sørensen

# THIS PRESENTS PROBLEMS

## Publishers

- *Identity of an author?*
- *Affiliation?*
- *Reviewer credibility?*

## Employers

- *Tracking research outputs?*
- *Tenure, promotion?*
- *External funding?*

## Funders

- *Pre-award evaluation?*
- *Applicant affiliation?*
- *Post-award evaluation?*

# ORCID PROVIDES

Persistent digital identifiers that distinguish researchers from each other



ORCID iD	First name	Last name
0000-0002-8431-8539	Xiaoyan	Wang
0000-0001-6382-3264	Xiaoyan	Wang
0000-0003-4630-0060	Xiaoyan	Wang
0000-0002-2036-8174	xiaoyan	wang
0000-0002-0015-8890	Xiaoyan	Wang
0000-0001-6120-3328	Xiaoyan	Wang
0000-0002-7745-4794	Xiaoyan	Wang
0000-0002-4255-8200	xiaoYan	wang
0000-0002-0394-8679	Xiaoyan	Wang
0000-0002-5920-8709	Xiaoyan	Wang

# MORE THAN A NUMBER

- ✓ Plumbing for research information
- ✓ Tools to build trust in digital information
  -  Persistent digital identifiers to distinguish researchers from each other
  -  Member-built integrations that connect researchers and their activities/affiliations
  -  A hub for synchronizing machine-readable connections between identifiers for people, organizations, and research activities





# ORCID IS OPEN

- Non-proprietary and platform-neutral
- Registry use is free for individuals
- Public API is free to use by anyone
- Independent non-profit membership organization
- Open data, software, APIs, and documentation



# ORCID MAKES LIFE EASIER FOR RESEARCHERS

Researchers like:

- Credit for their work

And they want to avoid:

- Completing the same forms over and over again

Because:

- They want to get on with research!
- And be rewarded for doing so!



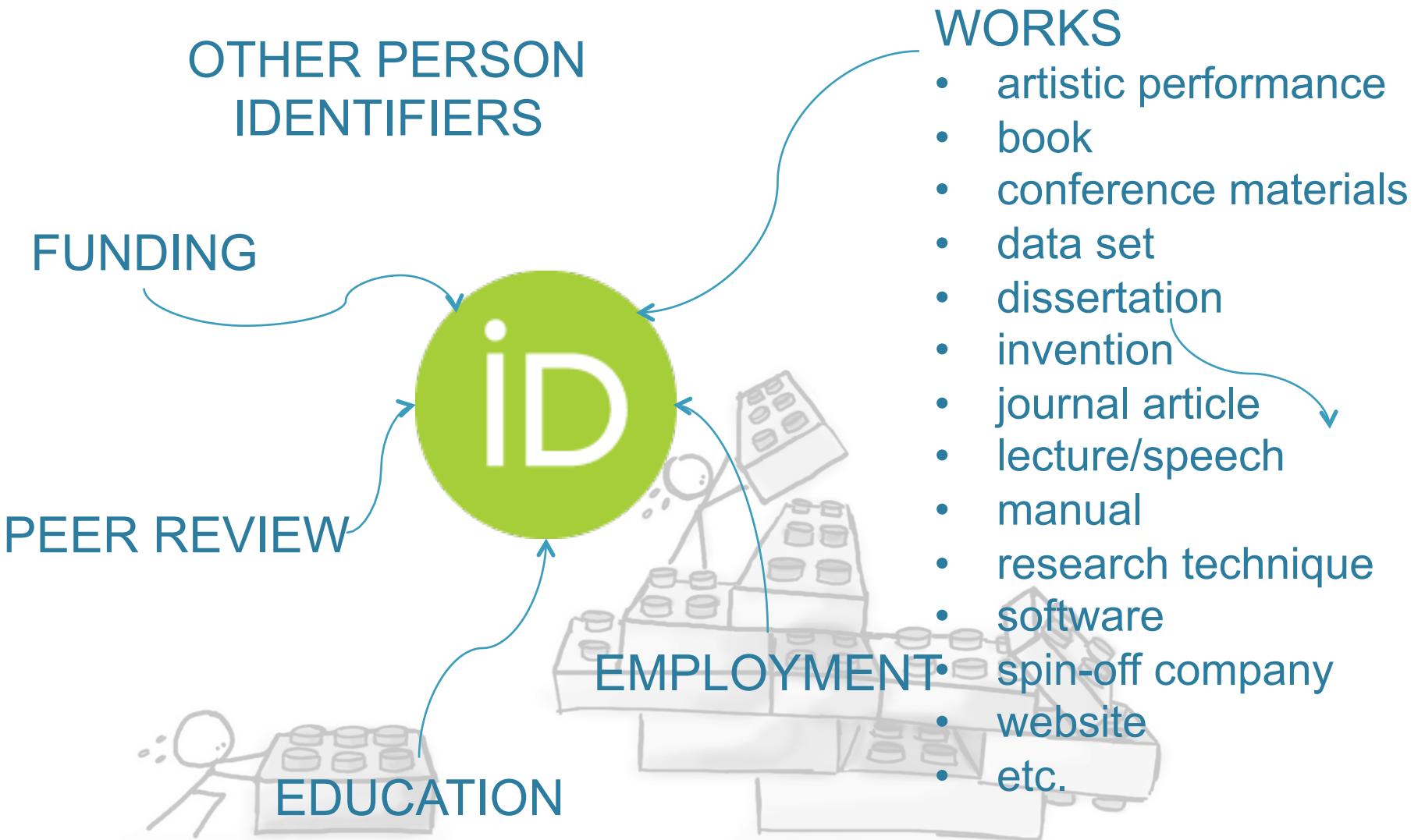
# ORCID IS CONTROLLED BY THE RESEARCHER

- Fine grained privacy controls
- Researchers grant update permission to those they trust. e.g. publishers, institutions, funders.

Who can see this?



# ORCID LINKS TO MANY THINGS



# WHO IS USING ORCID?

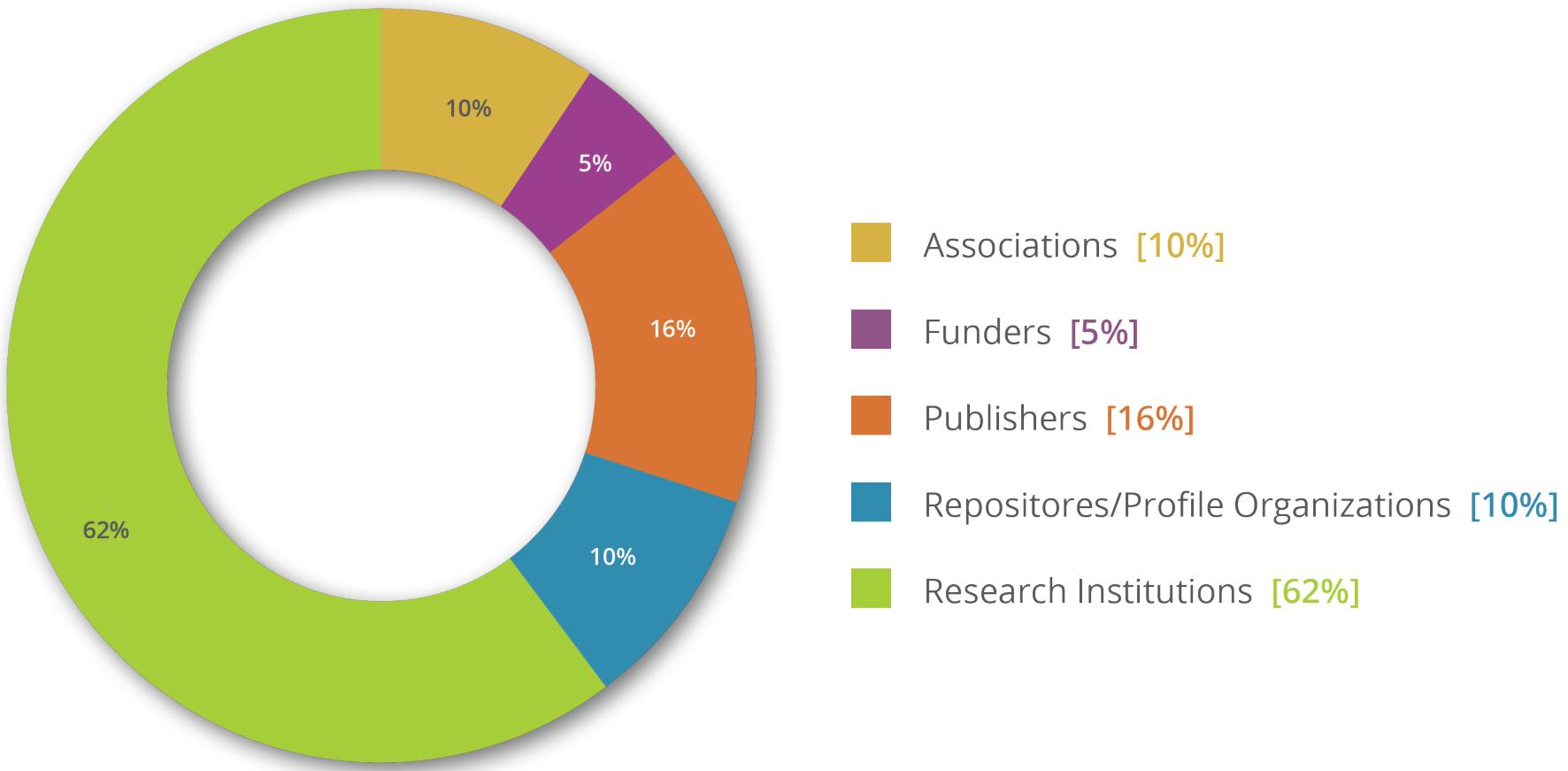
...AND HOW?



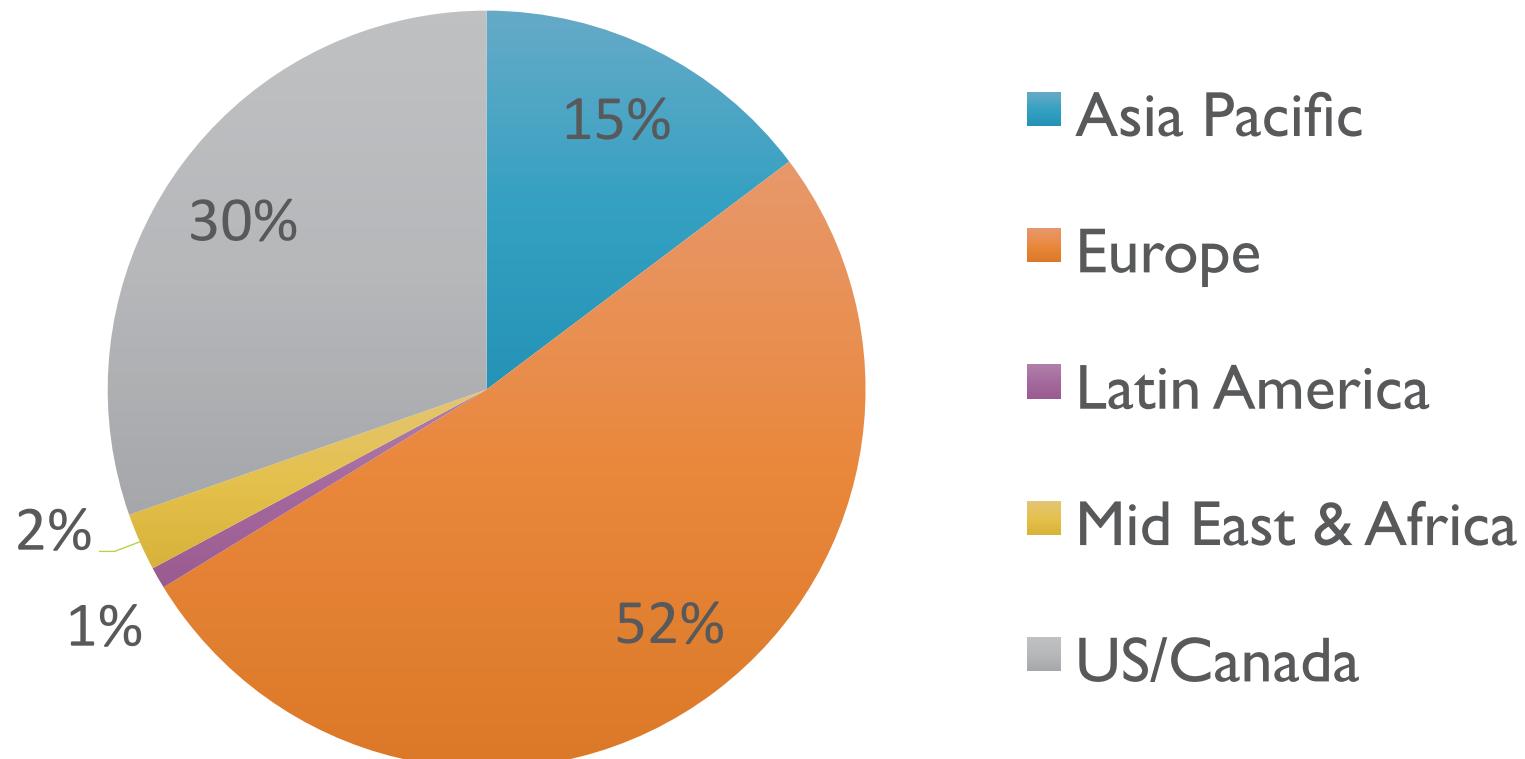
# ORCID IS INTERNATIONAL

- 600+ Members worldwide
- Multilingual staff in 5 continents
- Multiple languages supported
- Over 3.1 million ORCID iDs

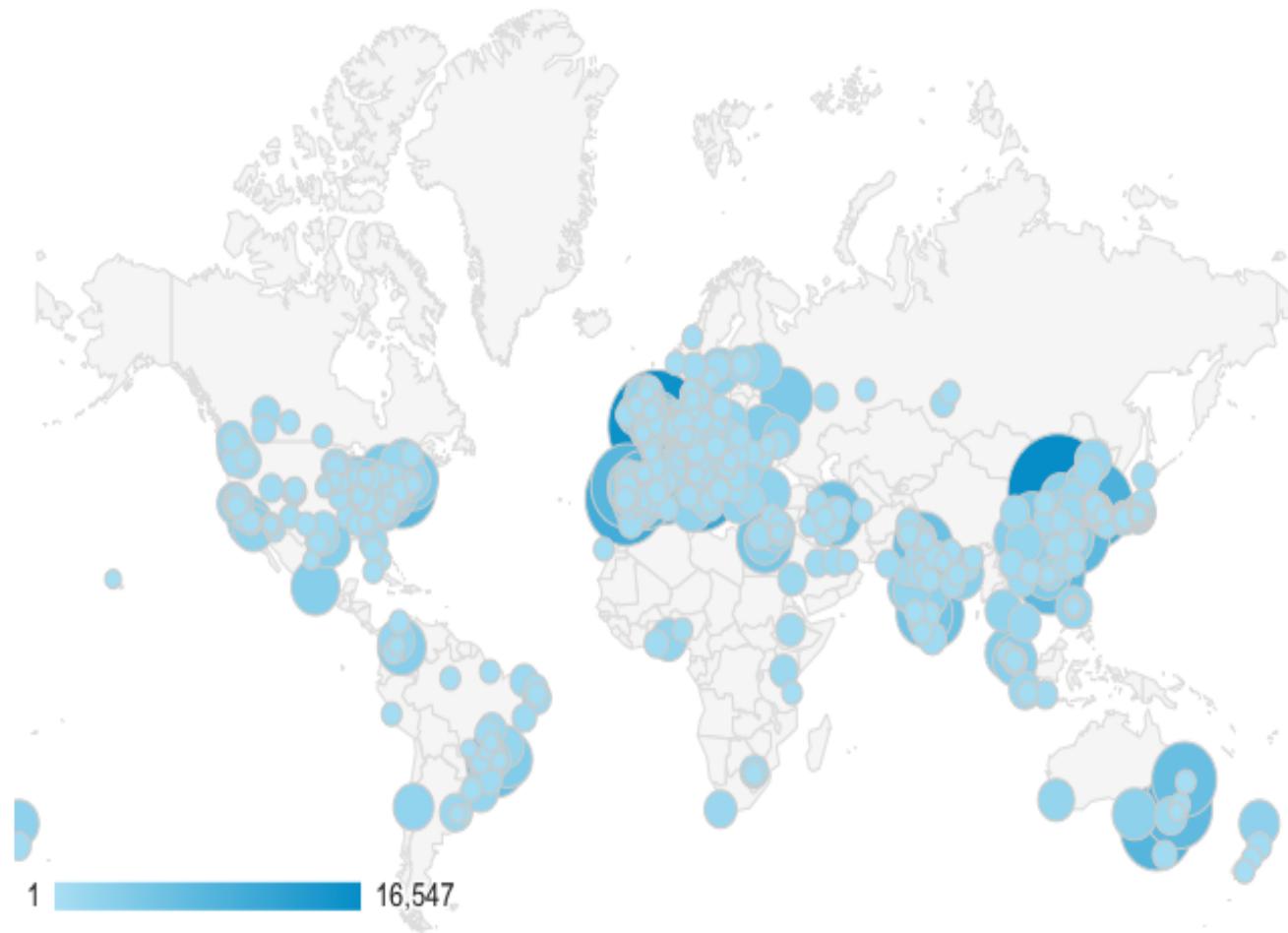
# INTEGRATIONS BY SECTOR



# INTEGRATIONS BY REGION



# GLOBAL REGISTRY VISITS



# THANKS FOR LISTENING

- Join me tomorrow for a more technical look at ORCID and a hands-on introduction to the API.





# INTRODUCING ORCID

## TECHNICAL AND USER PERSPECTIVES

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Connecting Research  
and Researchers

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ORCID.org 19



**ORCID'S VISION** IS A WORLD WHERE ALL WHO  
PARTICIPATE IN RESEARCH, SCHOLARSHIP, AND  
INNOVATION ARE UNIQUELY IDENTIFIED AND  
CONNECTED TO THEIR CONTRIBUTIONS AND  
AFFILIATIONS ACROSS TIME, DISCIPLINES, AND  
BORDERS.



# THE USER PERSPECTIVE

Researchers like:

- Credit for their work

And they want to avoid:

- Completing the same forms over and over again

Because:

- They want to get on with research!
- And be rewarded for doing so!

# USING THE ORCID REGISTRY

Two simple steps:

1. Register for an iD
  
2. Use the iD when
  - Publishing articles and datasets
  - Registering for meetings
  - Performing peer review
  - Applying for grants
  - Using university resources
  - Adding email signatures, web pages, CVs and more



# REGISTERING

## 1. Registering for an iD

- Self-registration only  
[orcid.org/register](https://orcid.org/register)
-  Sign in with ORCID
- Less than 30 seconds
- Duplicate filters
- Unique email
- Name check

First name

Last name

Email

Email check

s.garcia@orcid.org already exists in our system. Would you like to Sign in using s.garcia@orcid.org?

Name check

Re-enter email

We've found the following records that may be you. Your institution may have already created an ORCID Record for you. To access an existing account [Sign In](#).

None of these are me - continue to registration

ORCID iD	Email	First Name(s)	Last Name	Institution
0000-0001-5727-2427	s.garcia@orcid.org	Sofia	Garcia	
0000-0002-1719-2243		Sofia	Amaral-Garcia	
0000-0001-7652-6429		SOFIA DE LAS NIEVES	GARCIA GAMEZ	

Email displayed if public on record

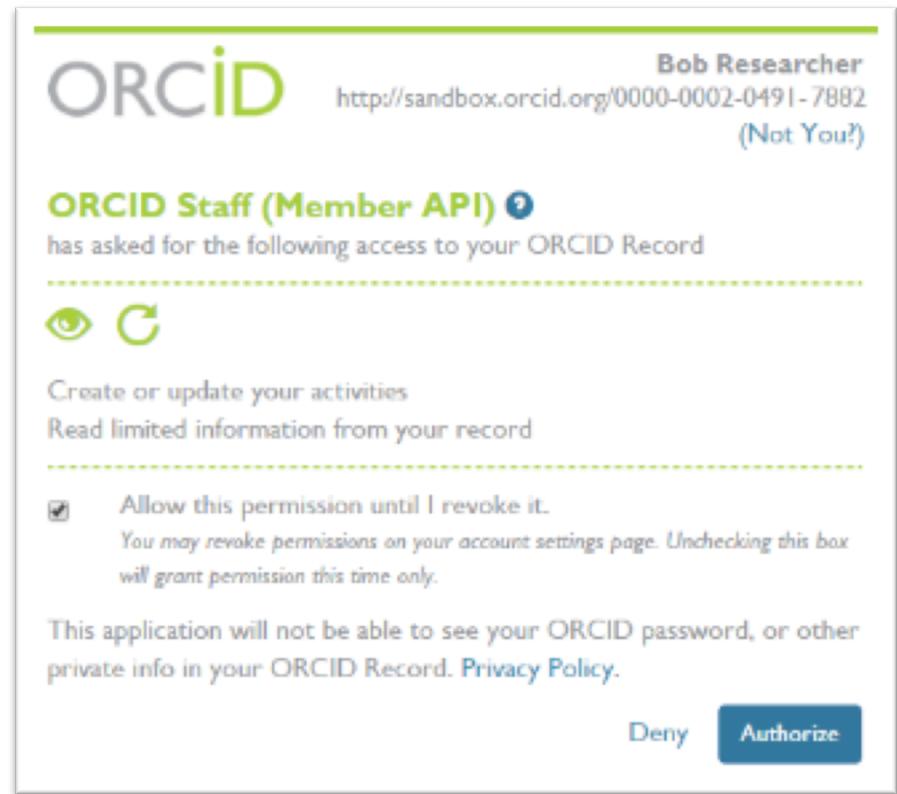
None of these are me - continue to registration



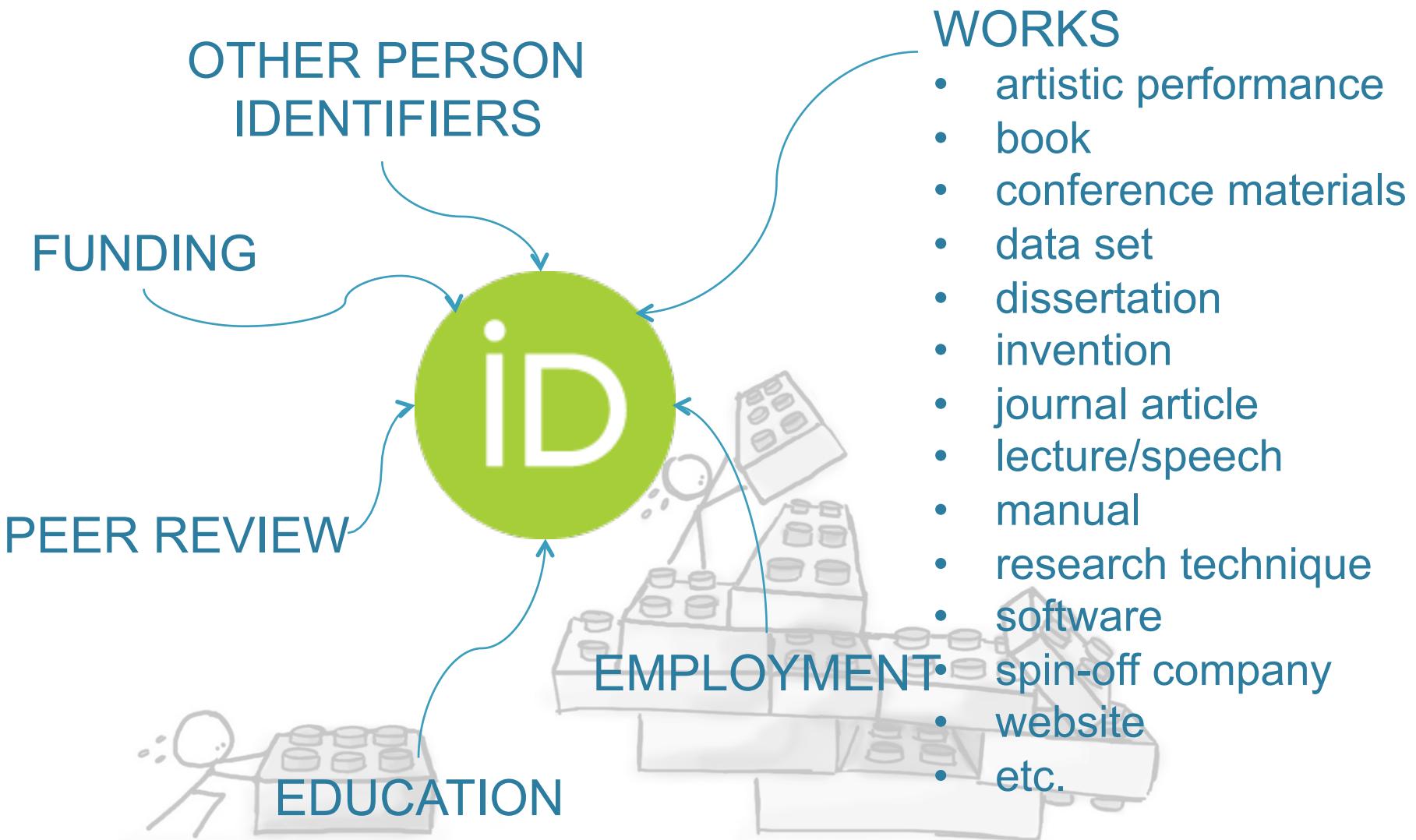
# USING THE ID

## 2. Using the iD

- Provide an authenticated iD as well as a name
- Grant permission to read / write to the ORCID record (trusted parties)
- Sign into sites with ORCID account



# BUILDING AN ORCID RECORD





# BIOGRAPHICAL DETAILS

- NAMES: can include multiple names, including misspellings, past names, initials
- KEYWORDS: include terms to distinguish researcher from others
- WEBSITES: link to other resources such as blogs and project pages
- EMAILS: include all emails, even past ones
- OTHER IDs: person IDs from other systems to link accts (only added via API)
- BIOGRAPHY: adds context and detail



Sofia Maria  
Hernandez  
Garcia

## ORCID ID

orcid.org/0000-0001-5727-2427

[View public version](#)

[Switch account](#)

[Get a QR Code for your iD](#)

## Also known as

S. M. Garcia,  
Sofia Maria Garcia

## Country

Keywords  
Testing and Support

## Websites

[Linked In](#)  
[Faculty Profile webpage](#)

## Emails

[sofia.m.g.hernandez@gmail.com](mailto:sofia.m.g.hernandez@gmail.com)  
[s.garcia@orcid.org](mailto:s.garcia@orcid.org)

## Other IDs

[Profile system identifier A-123456](#)



[Scopus Author ID 56030991900](#)





# AFFILIATION DETAILS

- EDUCATION: educational affiliations, linked by unique organization identifiers
- EMPLOYMENT: employment affiliations, linked by unique organization identifiers

**▼ Education (1)**

**Universidad Politécnica de Madrid: Madrid, Madrid, ES**  
2008-09 to 2012-05 | BA (Computer Science)

SOURCE: Sofía María Hernández García

CREATED: 2015-01-20

**▼ Employment (1)**

**ORCID: Bethesda, MD, US**  
2012-10 to present | (Support & Testing)

SOURCE: Sofía María Hernández García

CREATED: 2015-01-20





# FUNDING

- FUNDING: grants, awards, contracts, and salary awards, identified by unique identifier
  - Search & link wizard with ÜberWizard
  - Linked to funders by unique organization IDs

The screenshot shows the ORCID interface for managing funding records. At the top, there's a navigation bar with a green 'Funding (0)' button, a '+ Add funding' button, and a 'Sort' button. Below this, a large green header says 'LINK FUNDING'. A banner for 'ÜberWIZARD for ORCID' is visible. The main content area displays a grant record for 'Grant for ORCID' from 'Wellcome Trust (London, United Kingdom)' from 2014 to present. It includes a 'SOURCE: Sofia Maria Hernandez Garcia' link and a 'Preferred source' checkbox. To the right, there's a sidebar with options: '+ Add funding', 'Search & link', and '+ Add manually'. The bottom part of the screenshot shows a 'Search & link' wizard interface with a stick figure icon, a magnifying glass, and a document icon.

+ Add funding    ↗ Sort

▼ Funding (0)

LINK FUNDING

ORCID works with our member organizations to make it easy to connect your ORCID iD and link to information about your grants, awards, contracts, and salary awards. Choose one of the link wizards to get started.

über WIZARD for ORCID

+ Add funding    ↗ Sort

▼ Funding (1)

Grant for ORCID  
Wellcome Trust (London, United Kingdom)  
2014 to present | Grant

SOURCE: Sofia Maria Hernandez Garcia

Preferred source

+ Add funding    ↗ Sort

Search & link

+ Add manually

iD

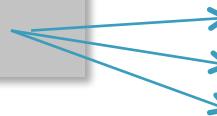


# WORKS

- WORKS: broadly-defined research outputs including publications, datasets, patents, dissertations and more
  - 11 search & link wizards
  - Import/Export via BibTeX
  - Add manually (not recommended)



Works added by multiple sources are grouped together based on having the same work identifier.



Sources Close sources Preferred

CASRAI and ORCID: Putting the pieces together to collaboratively support the research community  
2014 | conference-paper  
DOI: [10.1016/j.procs.2014.06.045](https://doi.org/10.1016/j.procs.2014.06.045), EID: 2-s2.0-84904471842  
URL: <http://www.scopus.com/inward/record.url?eid=2-s2.0-84904471842&partnerID=M...>

Scopus to ORCID	<input type="checkbox"/> Make preferred	
CrossRef Metadata Search	<input type="checkbox"/> Make preferred	
Sofia Garcia	<input checked="" type="checkbox"/> Preferred source	



# USER PRIVACY

Information in an ORCID Record has a visibility setting, which only the account owner can set – API cannot override.

Who can see this?



Accessible by :

**ANYONE**



*Public view*

**TRUSTED PARTY**



*Account owner, Trusted orgs & individuals*

**PRIVATE**



*Account owner*

Account information (settings, permissions) accessible by the account owner.

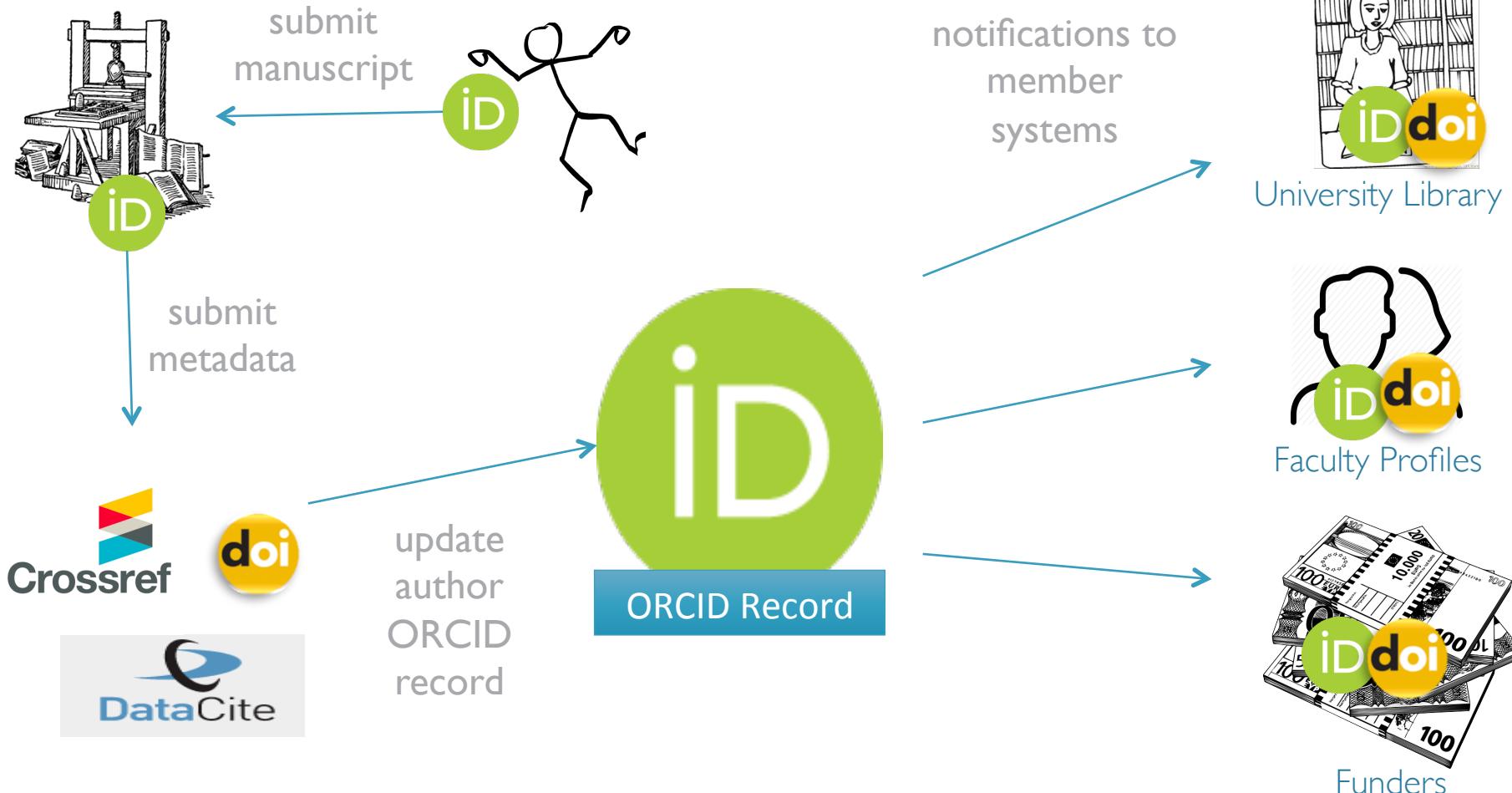


**Sara Häntzi**  
@SaraHaenzi

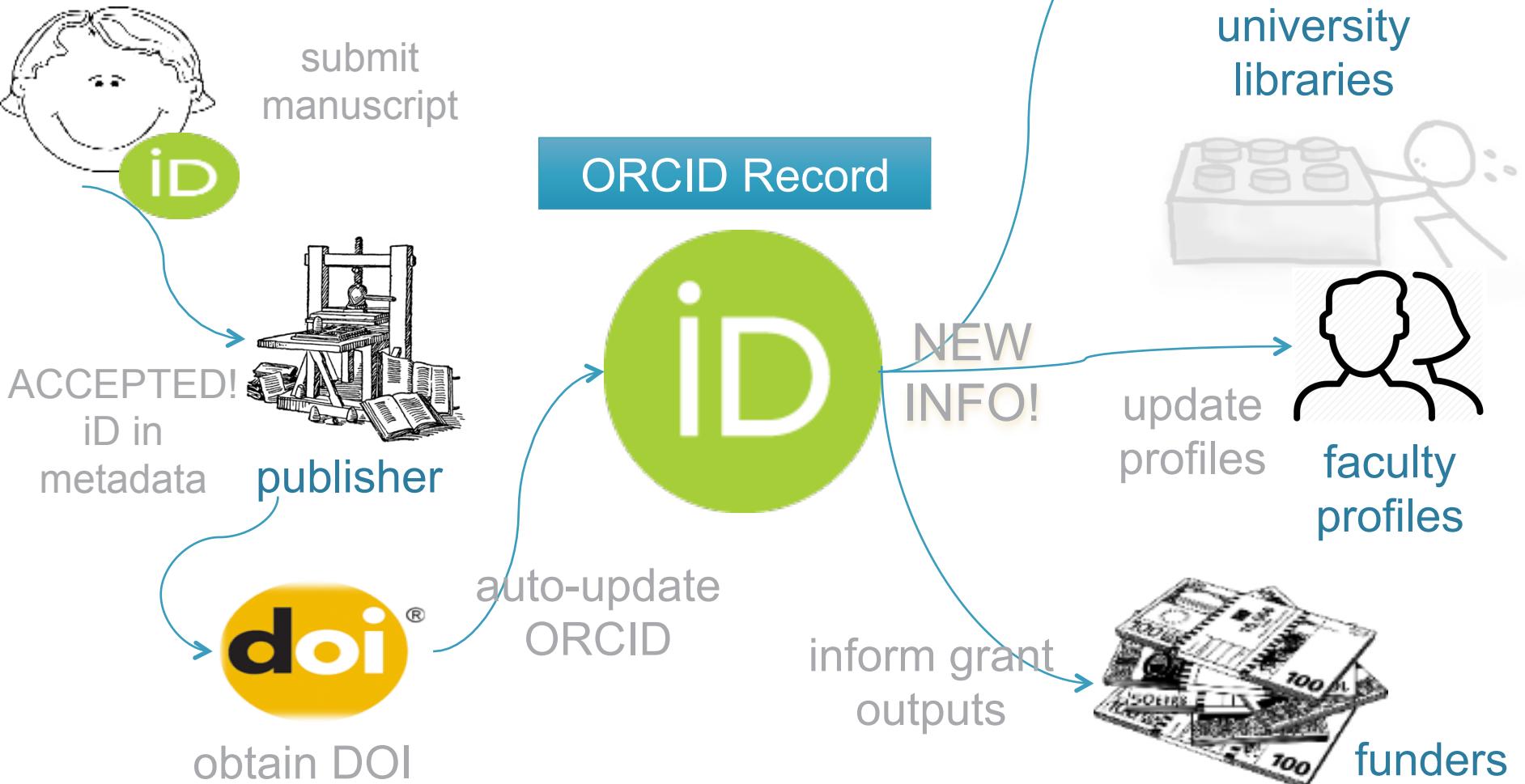
have not yet heard from @J\_Exp\_Biol about proofs but @ORCID\_Org tells me @CrossrefOrg wants to add the new article to my ORCID - cool!

5:13 pm - 4 Nov 2016 <https://twitter.com/SaraHaenzi/status/794467574557904896>

# ORCID IN ACTION



# AUTO-UPDATE



# AUTO-UPDATE IN ACTION



Hi Josh Brown,

You have 1 new notification in your ORCID inbox - see summary below. Please visit your [ORCID Inbox](#) to take action or see more details.

- ✉ Crossref: Add your published work(s) to your ORCID record (2016-09-26)

## ▼ Works (1)

**Open Access in Context: Connecting Authors, Publications and Workflows U...** <http://dx.doi.org/10.3390/publications4040030>

[more info...](#)

[Add now](#)

[View details in your ORCID inbox](#)

You have received this message because you opted in to receive weekly inbox notifications about your ORCID record.  
[Learn more about how the Inbox works.](#)

You may adjust your email frequency and subscription preferences in your [account settings](#).

# AUTO-UPDATE IN ACTION



Crossref

has asked for the following access to your ORCID Record



Read items in your ORCID record

Create or update your activities

Allow this permission until I revoke it.

*You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.*

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

[Sign into ORCID](#) or [Register now](#)

Personal Account

Institutional Account

Sign in with your ORCID account

Email or iD \*

0000-0002-8689-4935

2

ORCID Password

\*\*\*\*\*|

2

[Forgotten password?](#)

Deny

Authorize

# AUTO-UPDATE IN ACTION

**Authorized!**

Congratulations, you have given permission for Crossref to add and modify works in your ORCID record.

You can revoke this at any time at  
<https://orcid.org/account>

[close window](#)

# AUTO-UPDATE IN ACTION

Jake VanderPlas @jakevdp · 2h  
My first @JOSS\_TheOJ paper passed review and is published! [joss.theoj.org/papers/10.2110...](http://joss.theoj.org/papers/10.2110...)

11 11 ...

Jake VanderPlas  
@jakevdp

Follow

Wow... that was fast! @ORCID\_Org  
@JOSS\_TheOJ

Hi Jacob VanderPlas,

You have 1 new notification in your ORCID inbox - see summary below. Please visit your ORCID Inbox to take action or see more details.

⌚ Crossref: Add your published work(s) to your ORCID record

▼ Works (1)

mst\_clustering: Clustering via Euclidean Minimum Spanning Trees <http://dx.doi.org/10.21105/joss.00012>

more info... Add now

View details in your ORCID inbox

**DATA CITATION ALSO PROVIDE  
AUTO-UPDATES!**

**(THEY WORK IN THE SAME WAY)**

# PUBLISHER REQUIREMENTS

Other publishers requiring ORCID iDs in 2016:  
PLOS,  
eLIFE,  
Science,  
Hindawi,  
IEEE,  
AGU...



Publishing blog

## From January you'll need an ORCID

7 December 2015 by [Phil Hurst](#)

*Mandating the use of Open Researcher and Contributor ID (ORCID) by submitting authors.*

ORCID provides a unique identifier for all researchers that can be linked to their different research works and activities across multiple platforms. It also serves to distinguish authors with similar names and simplify searching of publications databases (such as PubMed, Scopus, etc.) to avoid retrieving articles by authors with similar names. Close to 1.8 million researchers have already created their ORCID iD. The service is non-profit and community driven.

From 1 January 2016, we will require the submitting author to provide an ORCID identifier as part of the manuscript submission process. Details of the practicalities will be provided shortly, but don't worry, it takes less than a minute to register for an ORCID iD and it's free of charge. A [recent survey](#) carried out by ORCID indicates strong support in the research community for mandates by publishers, funders, and universities.



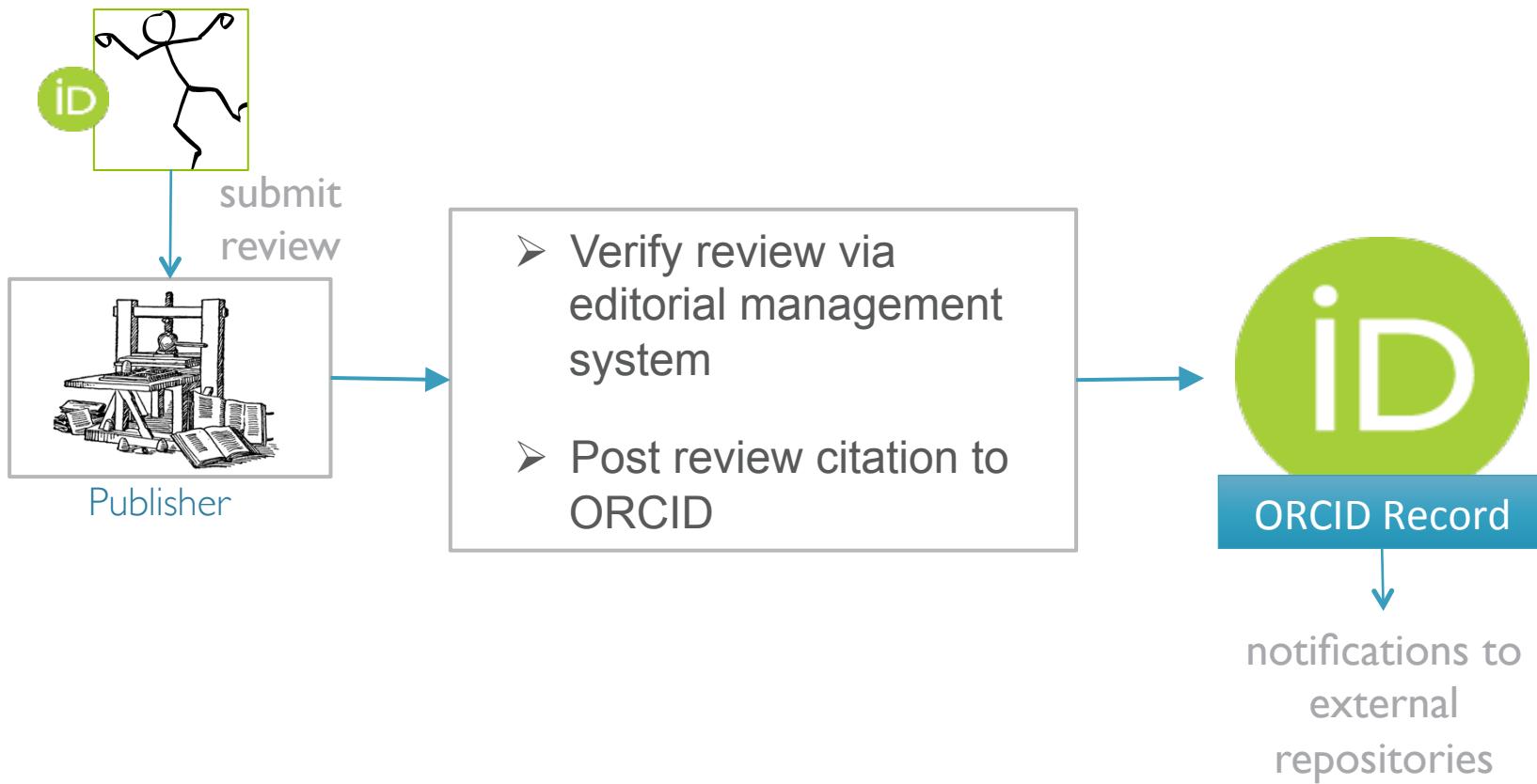
# ITS NOT JUST PUBLISHERS

Funders, data repositories, professional associations, national reporting systems and more all connect with ORCID. Many are starting to require ORCID.

Institutions connect with ORCID via CRIS systems and repositories.



# PEER REVIEW WORKFLOW



# AFFILIATION ROUND TRIP

- A user signs in to ORCID using their organization credentials (via their federated IdP)
- If their home institution is an ORCID member, sign-in can trigger an alert for the member to request permissions to read/write to that user's ORCID record
- Granted permission, the member can then assert affiliation into the user's ORCID account.

## LINKED

You have linked your Penn State account. You now may sign in using this account.

You may unlink your accounts at any time on the Account Settings page.

[Close](#)

## SHARE YOUR ID WITH YOUR INSTITUTION

Awesome University 

has asked to become a trusted organization with the following permissions:



Get your ORCID ID  
Read your ORCID record  
Update items in your ORCID Record

Allow this permission until I revoke it.

(You may revoke permissions on your account settings page.  
unchecked this box will grant the permission this time only.)

This application will not be able to see your ORCID password, or private info in your ORCID Record. See ORCID's [Privacy Policy](#).

[Deny](#)

[Authorize](#)



# NATIONAL CASE STUDIES:

**UK,  
ITALY,  
GERMANY.**

# ORCID IN THE UK

Following several years of consensus building, Jisc and ARMA funded 8 projects to test ORCID implementation.

Their report sets out the benefits of large-scale adoption: <http://orcidpilot.jiscinvolve.org>

JISC have now formed a national ORCID consortium. 77 Universities and 7 Research Councils have joined already



# ORCID IN THE UK

NIHR and Wellcome Trust mandate ORCID iDs for grant submissions.

The Research Councils have implemented ORCID in their grant application and their outputs system.

HEFCE are exploring how encourage the use of ORCID iDs.



# ITALY

Cineca have created a national ORCID consortium in Italy.

70 Universities and 4 research centres joined as a result, with more to follow.



# ITALY

## A NATIONAL HUB

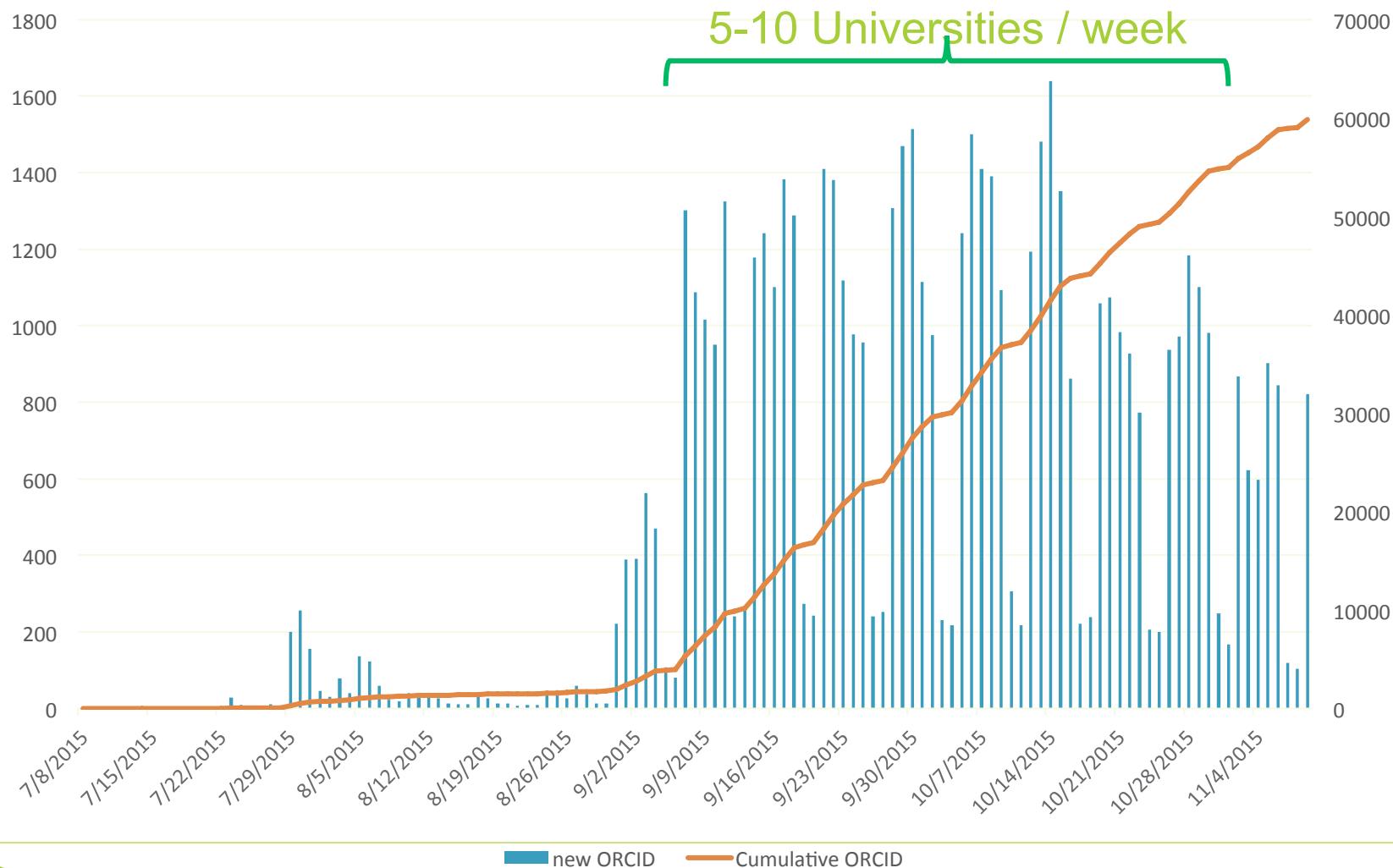
NVUR and CRUI have launched the Italian Researcher Identifier for Evaluation (IRIDE) project:

They have used a national hub approach, and this has driven researcher adoption.

By the end of 2016 at least 80% of Italian researchers (including PhD students and post-docs) will possess an ORCID iD linked to their publications back to 2006

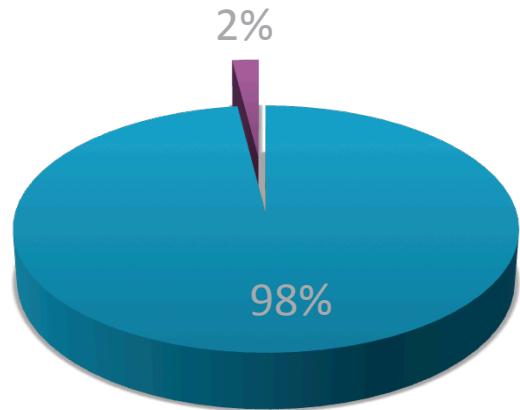


# ITALY

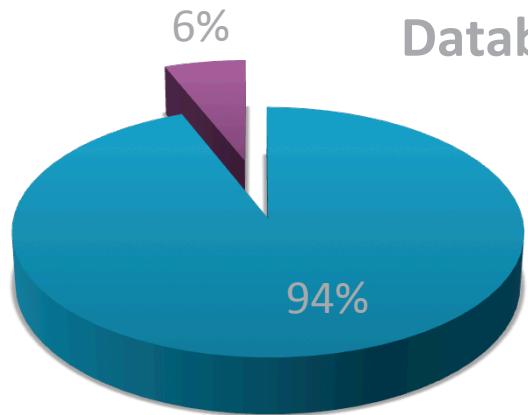


# ITALY

ORCID HUB



National Database



YES  
NO

# GERMANY

National pilot funded by the Ministry for Research  
(DFG) – ORCID DE

Integrating in national information systems (Authority  
Files, Repositories etc.)

12 participating Universities

Consortium agreement started in October



# ELSEWHERE

NATIONAL CONSORTIA LAUNCHED OR ABOUT TO LAUNCH IN:

- Belgium
- Finland
- Netherlands
- New Zealand
- Norway
- Sweden
- Taiwan

In addition to the existing consortia in Australia, Denmark, Italy, United Kingdom, Germany, United States (3)



# INTRODUCING ORCID

THE API

TOM DEMERANVILLE | HELSINKI BOOTCAMP | MARCH 2017



Connecting Research  
and Researchers

TOM DEMERANVILLE  
*Senior Project Officer – Project THOR*  
<http://orcid.org/0000-0003-0902-4386>

ORCID.org

# ORCID ENABLES



Organizations use the ORCID API to authenticate, collect, display, and connect persistent identifiers for people, places, and things in research workflows



# THE ORCID API

API	Features
<b>Public API</b> Freely available to anyone	<ul style="list-style-type: none"><li>• <b>Authenticate:</b> Get a user's authenticated ORCID iD</li><li>• <b>Read (Public):</b> Search/retrieve public data</li><li>• <b>Create:</b> Facilitate creation of new ORCID records (via on-demand process)</li></ul>
<b>Member API</b> ORCID member organizations (Sandbox test environment freely available to anyone)	<ul style="list-style-type: none"><li>• <b>Read (Limited):</b> Search/retrieve limited-access data</li><li>• <b>Add:</b> Post new items to a record</li><li>• <b>Update:</b> Edit or delete items you previously added</li></ul>
<b>Premium Member API</b> Premium ORCID member organizations	<ul style="list-style-type: none"><li>• <b>Webhooks:</b> Receive notifications of updates</li><li>• Customised monthly reports (including email stats)</li><li>• Access to monthly public data file</li></ul>



# ORCID REGISTRY CONNECTIONS

Two models:

## 1. Connect via a vendor system

- Manuscript submission/publication
- Document/data repositories
- Profile systems
- CRIS systems

## 2. Develop a custom connection



# VENDOR CONNECTIONS

## Publishing

- eJournal Press
- Editorial Manager
- Open Journal Systems
- ScholarOne

## Document / data repositories

- DSpace
- ePrints
- Hydra/Fedora

## CRIS Systems

- Converis
- Elements
- IRMA
- Pivot
- PlumX
- Pure
- Vivo

Find more:

<https://members.orcid.org/orcid-enabled-systems>



# CUSTOM INTEGRATIONS

Via the ORCID API

- Fine-tuned control and permissions
- Customized buttons, user flows, & user feedback
- Test and troubleshoot with ORCID Community Team

Case examples: <https://members.orcid.org/resources>

Code examples: <https://members.orcid.org/api/resources/code-examples>



# USER CONTROL: A KEY PRINCIPLE

**Researchers own their ORCID records. When using the API the researcher must be involved.**

- Only the researcher can create an ORCID record: you cannot create one on their behalf.
- The researcher must grant you permission to access/ update. If you need additional permissions, you will need to ask again.
- The researcher can revoke permissions granted.
- The researcher sets the visibility of all items of their record. If it's private, you can't read it – including email addresses. (In process: ability to request email access, even if private.)



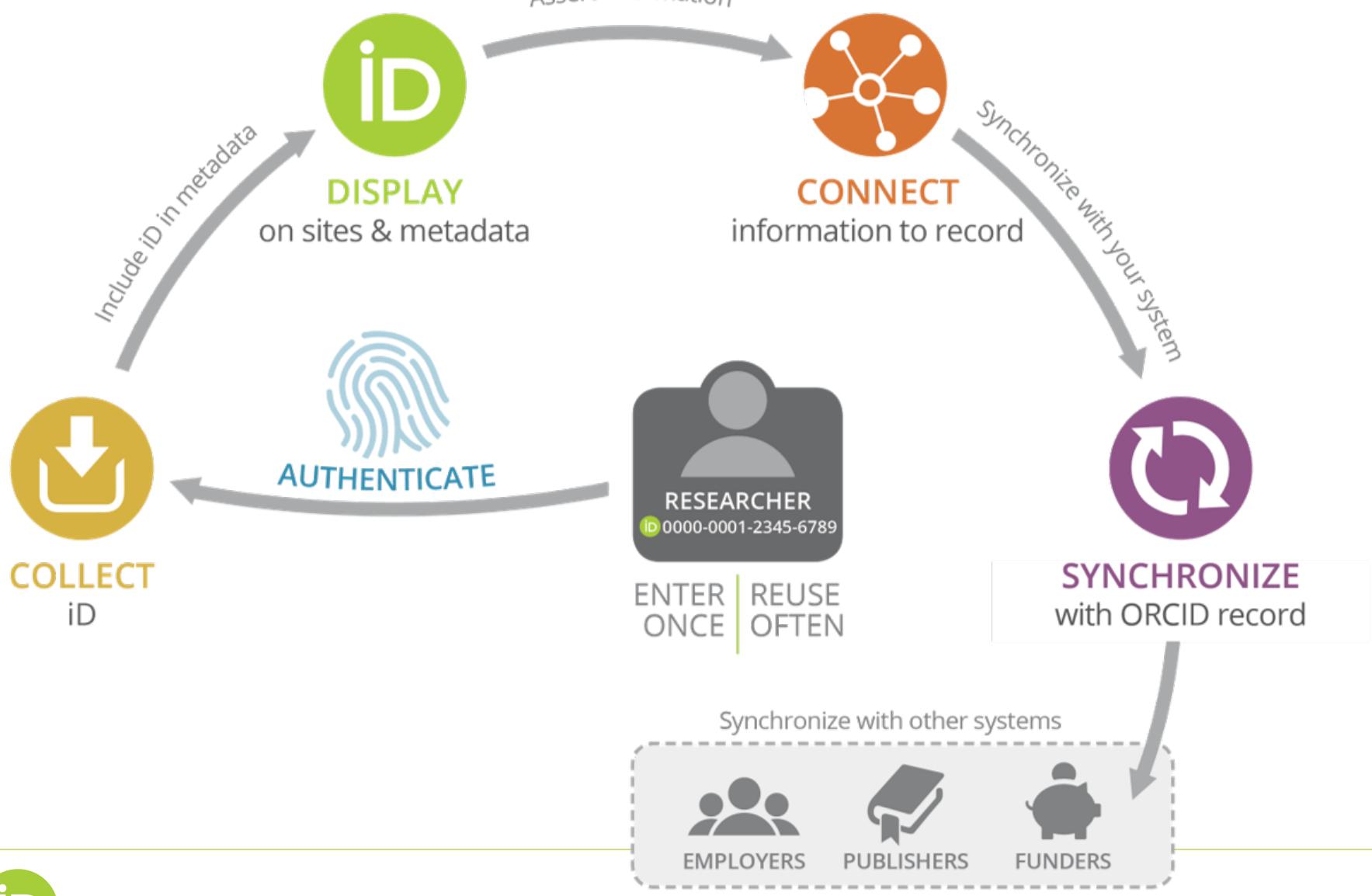
# THE ORCID API IN A NUTSHELL

- **Current version:** 2.0
- **Permissions / scopes:** your contract with the user
- **OAuth calls:** how you execute the contract
- **ORCID-specific calls:** to provide & receive information with the registry
- **The ORCID message:** format of the data exchanged
- **Permitted message format:** send: XML, JSON  
receive: XML, JSON, HTML, RDF, GZIP, Turtle

XSD: <https://github.com/ORCID/ORCID-Source/tree/master/orcid-model/src/main/resources>



# COLLECT & CONNECT



# COLLECT



*COLLECT validated ORCID iDs for individuals*

- Explain what ORCID is
- Explain why you're collecting iDs
- Consistent user experience
- Authenticated connections

Ensure individuals are correctly connected with your institution

Many vendor systems use the OAuth validation process

# GET & USE PERMISSIONS

Do you have  
permission to do  
what you want to do?



Get the  
permission; store  
iD and “token”

OAuth

Yes!



ORCID Record

Read the record  
or update the  
record



# GET PERMISSION

ORCID registry depends on user-based permissions:  
Can I...

- have your iD (*/authenticate*)   
- read limited-access data on your record  
(*/read-limited*) 
- interact with the activities on your record  
(*/activities/update*)  
- interact with your biographical information  
(*/person/update*)  

Bob Researcher  
<http://sandbox.orcid.org/0000-0002-0491-7882>  
(Not You?)

**ORCID Staff (Member API) **  
has asked for the following access to your ORCID Record

Create or update your activities  
Read limited information from your record

Allow this permission until I revoke it.  
*You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.*

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

[Deny](#) [Authorize](#)



# INVOLVING THE USER

## Key benefits:

- You know the user controls the iD
- User knows what's going on/user choice
- Privacy/ data control trends
- Position/ strengthen your system as a service

## How?

- Just a customized URL
- Prior iD not needed
- Hard things: promotion, finding touch points



**ORCID** Bob Superbob  
<http://sandbox.orcid.org/0000-0002-0491-7882>

(Not You?)

**Sandbox API Tester** ? has asked for the following access to your ORCID Record

---

Add or update your research activities  
Read your limited-access information  
Add or update your biographical information

---

Allow this permission until I revoke it.  
*You may revoke permissions on your account settings page.  
Unchecking this box will grant permission this time only.*

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

Deny Authorize



# DESIGNING TOUCHPOINTS

Look for natural fits:

- Your sign in – why not link your iD?
- Your account settings/user profile
- Submission (of any type)
- Form fills: pre-fill from your record!
- Registration: for conference or meeting
- Reporting: Link your iD to get started



# STEP 1: AUTHORIZATION URL

The OAuth call: part I      the base URL, displays ORCID sign in screen

https://sandbox.orcid.org/oauth/authorize? \  
client\_id=APP-E422WM33OPZWKKMQ& \ ← who's asking?  
response\_type=code& \ ← what permissions?  
scope=/read-limited%20/activities/update& \  
redirect\_uri=https://my.URL.org& \ ← where the user goes next

family\_names=Researcher&given\_names=Bob&email=bobres  
earcher@mailinator.com&orcid=0000-0002-0491-7882&  
state=UNI-ID ← extra info to identify user to your system      ← personalize the experience



# WHAT THE USER SEES



Bob Researcher  
http://sandbox.orcid.org/0000-0002-0491-7882  
(Not You?)

ORCID Staff (Member API) ?

has asked for the following access to your ORCID Record



already signed in

Create or update your activities

Read limited information from your record

Allow this permission until I revoke it.

You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

Deny

Authorize



ORCID Staff (Member API) ?

has asked for the following access to your ORCID Record



sign in form  
(already registered)

Read limited information from your record

Create or update your activities

Allow this permission until I revoke it.

You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

ORCID

ORCID Staff (Member API) ?

has asked for the following access to your ORCID Record



Read limited information from your record

Create or update your activities

Allow this permission until I revoke it.

You may revoke permissions on your account settings page. Unchecking this box will grant permission this time only.

This application will not be able to see your ORCID password, or other private info in your ORCID Record. [Privacy Policy](#).

registration form

Already have an ORCID iD? [Sign In](#)

As per ORCID's [terms and conditions](#), you may only register for an ORCID iD for yourself.

First name  \*

Last name

Email  \*

Re-enter email

Create an ORCID password  \*

Confirm ORCID password  \*

Your ORCID iD connects with your ORCID Record that can contain links to your research activities, affiliations, awards, other versions of your name, and more. You control this content and who can see it.

By default, who should be able to see information added to your ORCID Record?



Sign into ORCID or Register now

Personal Account

Institutional Account

Sign in with your ORCID account

Email or iD \*

ORCID Password

[Forgotten password?](#)

Deny

Authorize

Email frequency

The ORCID registry provides notifications about things of interest, like changes to your ORCID record and new and events. How often would you like these notifications delivered to you via email?

I'm not a robot reCAPTCHA  
[Privacy - Terms](#)

Terms of Use \*

I consent to the [privacy policy](#) and [terms and conditions](#) of use, including agreeing to my data being processed in the US and being publicly accessible where marked Public.

[You must accept the terms and conditions to register.](#)



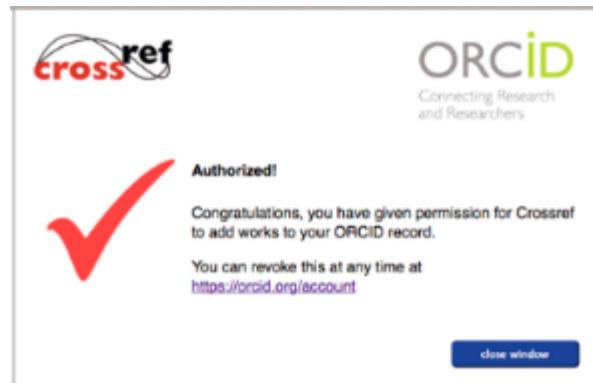
Deny

Authorize

# STEP 2: AUTH CODE & USER FEEDBACK

ORCID sends the user to your redirect, with a code (and any state parameter) appended to end  
<https://my.URL.org?htA3yE&state=UNI-ID> the auth code

- Save the code – you need it for the next step
- Display something useful to the user
  - Authorize: *thanks for your permission!*
  - Deny: *are you sure you don't want to give permission?*



authorize message

deny message

A screenshot of a web page from Crossref. It features the Crossref logo and the ORCID logo. The main text says, "No authorization has been given." Below this, a section titled "Why did Crossref contact me?" explains that publishers can send submission information to Crossref, which then links it to the user's ORCID record. A flowchart shows the process: "Your work(s) with a Publisher" leads to "Publication info sent to Crossref", which leads to "Your auto-updated ORCID record". At the bottom, a section titled "May we reassure you?" lists five points about how Crossref uses the information. At the very bottom are two buttons: "I changed my mind, authorize Crossref." and "Do not authorize Crossref.".

# STEP 3A: TRANSFORM THE CODE INTO A TOKEN

our API calls always look like URLs (RESTful)

Use the code to gain access using the ORCID API

<https://sandbox.orcid.org/oauth/token>

HEADER: accept:application/json

what format?

DATA:

client\_id=APP-XT8FBKJRO3MR8WDR

client\_secret=e285575c-4794-464b-a807-6f1c06b63

grant\_type=authorization\_code

code=htA3yE

the auth code

redirect\_uri=https%3A%2F%2Fmy.URL.org

confirming that you are the right one to get this information



# STEP 3B: STORE THE RESULT

The result of the call

```
"access_token": "6710dfee-6aab-445b-a266-205dd9085273",  
"token_type": "bearer",  
"refresh_token": "2d76d8d0-6fd6-426b-a017-61e0ceda0ad2",  
"expires_in": 631138518, ← when permission expires (in seconds)  
"scope": "/read-limited /activities/update", ← what you can do  
"orcid": "0000-0002-0491-7882",  
"name": "Bob Researcher" ← iD & name for the person  
who gave permission
```



✓ iD Collected!

store the access token,  
refresh token and iD with  
user's info in your system



# DISPLAY



DISPLAY iDs on your website, platform, systems

- iDs shown as a link
- iDs in metadata
- Use the ORCID Member logo
- Explain why iDs are collected

Signal to your researchers and the wider community that your systems are plumbed to support ORCID iDs

<https://orcid.org/trademark-and-id-display-guidelines>



# DISPLAY: IDS IN ARTICLES

## iDs in print (pdf)

Science and Technology (CONACyT) and the Posgrado en Ciencias Biológicas (UNAM).

**ORCID**

Ángel Eliezer Bravo-Monzón  <http://orcid.org/0000-0001-7172-0302>  
Francisco J. Espinosa-García  <http://orcid.org/0000-0001-9173-1957>

**References**

Borowiec, L. (2002). New records of Neotropical Cassidinae, with description of three new species from Mexico. *Biocontrol Science and Technology*, 12(1), 11-18.

Biocontrol Science and  
Technology, Taylor & Francis



## iDs in html

Dmitri A Nusinow [CLOSE](#)  
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**Contribution:** Conception and design, Analysis and interpretation of data, Drafting or revising the article

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*No competing interests declared*

Huang, Cnan Yui Yoo, Rebecca Blumenthal, Jessica Goldsworthy, Evans, Meng Chen, Dmitri A Nusinow 

eLife



# DISPLAY: IDS IN PROFILES

Haak, Laurel L

[Get A Badge](#)

[ResearcherID Labs](#)

ResearcherID: C-4986-2008

URL: <http://www.researcherid.com/rid/C-4986-2008>

Subject: Neurosciences & Neurology; Science & Technology - Other

Keywords: circadian rhythms; calcium imaging; confocal microscopy; metabotropic glutamate receptors; adenosine receptors; glial cells; suprachiasmatic nucleus; program evaluation; workforce modeling; diversity; gender equality policies

ORCID: <http://orcid.org/0000-0001-5109-3700>



The University of Auckland

**Dr Julie Choisne**

*MSc Paris, PhD in Biomechanics ODU*



Honorary Academic

In: [Auckland Bioengineering Institute](#)

Identifiers

<http://orcid.org/0000-0001-5418-5870>

Contact details

+64 9 373 7999

[jcho911@aucklanduni.ac.nz](mailto:jcho911@aucklanduni.ac.nz)

ResearcherID



# DISPLAY: IDS IN METADATA

ORCID iD in DOI metadata:



```
<person_name>
  <given_name>Karl</given_name>
  <surname>Ward</surname>
  <ORCID authenticated="true">
    http://orcid.org/0000-0002-4121-9960
  </ORCID>
</person_name>
```

- iD available in search



# CONNECT



CONNECT your data to ORCID records

- Request permission to write to records
- Store long-lived tokens
- Add data that you uniquely can assert
- Explain the connection

Enable researchers to provide validated data to other systems they use

<https://orcid.org/blog/2015/10/26/auto-update-has-arrived-orcid-records-move-next-level>

# CONNECT VIA API TO SEND DATA

type of action, also: GET; PUT; DELETE

Verb: POST

BASE URL: <https://api.sandbox.orcid.org/v2.0/0000-0002-0491-7882/employment>

HEADERS: Content-type:application/vnd.orcid+xml

Authorization: Bearer 6710dfee-6aab-445b-a266-205dd9085273

DATA (if adding or updating):

the file location=@employment.xml

researcher's iD

endpoint:  
/education  
/work  
/funding  
/peer-review  
etc.

access token from before

1. Your client sends data

2. Researcher's record updated

▼ Employment (1)      Sort ↑↓

Awesome University: Awesome Town, Hong Kong SAR China  
2008 to present (Department of Awesomology)

Research Professor

Source: Awesome University      your client's name      Created: 2016-06-23



# READ & UPDATE THROUGH ORCID MESSAGE (SCHEMA)

```
1  <?xml Version="1.0" encoding="UTF-8"?>
2  <peer-review:peer-review
3      visibility="private" xmlns:common="http://www.orcid.org/ns/common"
4      xmlns:peer-review="http://www.orcid.org/ns/peer-review" xmlns:work="http://www.orcid.org/ns/work"
5      xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
6      xsi:schemaLocation="http://www.orcid.org/ns/peer-review ..../peer-review-2.0_rc1.xsd ">
7      <peer-review:reviewer-role>reviewer</peer-review:reviewer-role>
8      <peer-review:review-identifiers>
9          <work:work-external-identifier>
10             <common:external-identifier-url>http://www.wellcome.ac.uk/Funding/Biomedical-science/Application-
11                 information/Committees/WTP059408.htm</common:external-identifier-url>
12             <common:relationship>self</common:relationship>
13             <work:external-identifier-type>source-work-id</work:external-identifier-type>
14             <work:external-identifier-id>WTP059408</work:external-identifier-id>
15         </work:work-external-identifier>
16     </peer-review:review-identifiers>
17     <peer-review:review-url>http://www.wellcome.ac.uk/Funding/Biomedical-science/Application-
18         information/Committees/WTP059408.htm</peer-review:review-url>
19     <peer-review:review-type>review</peer-review:review-type>
20     <peer-review:review-completion-date>
21         <common:year>2014</common:year>
22     </peer-review:review-completion-date>
23     <peer-review:review-group-id>ringgold:5072</peer-review:review-group-id>
24     <peer-review:convening-organization>
25         <common:name>Wellcome Trust</common:name>
26         <common:address>
27             <common:city>London</common:city>
28             <common:region>London</common:region>
29             <common:country>GB</common:country>
30         </common:address>
31         <common:disambiguated-organization>
32             <common:disambiguated-organization-identifier>5072</common:disambiguated-organization-identifier>
33             <common:disambiguation-source>ringgold</common:disambiguation-source>
34         </common:disambiguated-organization>
35     </peer-review:convening-organization>
36 </peer-review:peer-review>
```

# SYNCHRONIZE



SYNCHRONIZE with your systems

- Update information when it changes
- Auto-add new information
- Search & link wizards
- Sync data from others

Saved time, better reporting, improved information flow

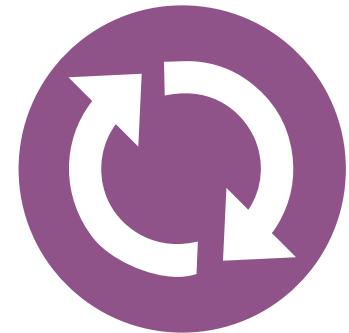
<https://members.orcid.org/api/tutorial-webhooks>

<https://orcid.org/blog/2015/10/26/auto-update-has-arrived-orcid-records-move-next-level>

# ENABLING SYNCHRONIZATION

## ORCID API features & tips:

- Update notifications (*webhooks*)
  - Your system registers iDs you're watching
  - ORCID notifies when changes happen
- Internal triggers
  - Employment status change
  - Publication acceptance
  - Publication correction
  - Funding award



# API DEMO: CREATE ON DEMAND

The screenshot shows a web page with the header "ORCID @ State University" and navigation links for "Home", "About ORCID", and "Contact ORCID". The main content features a large heading "Get an ORCID iD!" followed by a descriptive text: "Click the button below to create an ORCID iD and connect it to State University's faculty profile system." Below this is a button labeled "Create a new ORCID iD" with a green "id" icon. At the bottom, there is a link for users who already have an ORCID iD: "Already have an ORCID iD? Connect your existing ORCID iD".

ORCID @ State University

Home About ORCID Contact ORCID

## Get an ORCID iD!

Click the button below to create an ORCID iD and connect it to State University's faculty profile system.

 Create a new ORCID iD

Already have an ORCID iD? [Connect your existing ORCID iD](#)

<https://orcid-createondemand.herokuapp.com>



# THANKS FOR YOUR ATTENTION

Bootcamp: ORCID API (Searches, OAuth, Create on Demand)

<http://is.gd/VALA2016ORCID>

Member Support Centre

<https://members.orcid.org>

Workflows & integration points

<https://members.orcid.org/create-records>

API v1.2 technical documentation

<https://members.orcid.org/api>

API v2.0 technical documentation (Github)

<https://git.io/vXw5X>

ORCID API users listserv

<https://groups.google.com/group/orcid-api-users>

ORCID message (XSD) (Github)

<https://git.io/vXw5w>

Questions?

[support@orcid.org](mailto:support@orcid.org)

<http://support.orcid.org>

